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ABSTRACT

This publication offers a brief description of the content and instructional methods used during the three years of the Educational Management Project's inservice programs for educational administrators in the Tucson Public Schools. The discussion is organized into three sections that focus in turn on the activities and results of each of the project's three years. The impact of each year's evaluation results on the evolution of the project's training strategies is discussed. (Author/JG)

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EDUCATIONAL MANAGEMENT PROJECT

E.S.E.A. TITLE III

TUCSON PUBLIC SCHOOLS

TUCSON, ARIZONA

SUMMARY OF PROJECT ACTIVITIES AND RESULTS 1971 - 1974

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EA 008 061

I. Summary of Project Activities and Results, 1971-1974

A. Activities and Results of the Project's First Year

On September 27, 1971, eight of the district's administrators gathered in Room 201 of the Education Center for the first class of the Educational Management Project. These and 21 other administrators had voluntarily enrolled in the 13 inservice training sessions offered by the Project that first year. Instructing the administrators was the Project's director, Peter Gazzola (Pete), and assisting him was the Project's management specialist, Sherrie Schager.

The topic of the first session was educational decision making, the one activity that distinguishes the educational manager from the educational administrator (who, in the context of the Project, was in a position only to execute the decisions made by others). One of the major goals of the inservice sessions was that the administrators enrolled would acquire the skills and attitudes necessary to assume more responsibility as decision makers. The books and articles from which Pete and Sherrie had derived the content of the inservice sessions were in agreement on one point: Many of the problems characteristic of educational programs could be avoided entirely or prevented from becoming critical if the persons most immediately responsible for those programs were skillful decision makers who took an active role in identifying and solving problems before they grew to crises.

The remaining 12 sessions were attempts to underscore the importance of the decision maker's (manager's) role by analyzing the four major functions performed by the manager and practicing some of the skills needed to perform these functions effectively. Three 3-hour sessions were devoted to the planning function in which the seven steps of the planning process were studied and discussed:

1) Identify and document needs.
2) Establish objectives.
3) Select a general solution strategy.
4) Identify the tasks to be done.
5) Sequence the tasks.
6) Schedule the tasks.
7) Compute the cost of implementation.

In connection with the planning function, the participants were introduced to various tools for educational planning such as means-end analysis, the work-breakdown structure, Program Evaluation Review Technique (PERT) and Planning, Programming, Budgeting Systems (PPBS).

Two sessions each were devoted to the other three functions of the educational manager, the organizing, directing and controlling functions. The administrators enrolled in the Project's classes

studied policy development, the staffing process and organizational structures and practiced organizational charting during the sessions on the organizing function. They learned the purpose of the directing function (to satisfy the personal needs of their staff members while assuring success in meeting program objectives); they practiced distinguishing one-way from two-way communication and attempted to learn the skills of paraphrasing and behavior description for improving the quality of group communication. The CIPP model for evaluation (Context, Input, Process, Product Evaluation) formed the basis of the sessions on the controlling function and linked a manager's ability to assure the success of his program to the quality of evaluation information at his disposal.

The last three sessions of the first year series dealt directly with the decision-making process and the system approach to problem solving. While little emphasis was put on current "system" terminology, the problem-solving method of Roger Kaufman was introduced to the participants and related to the four management functions. The six steps of this process are:

1) Identify the problem to be solved from needs.
2) Identify possible solution strategies.
3) Select the "best" solution strategy.
4) Implement the strategy.
5) Evaluate the success of the strategy.
6) Recycle and revise any of the decisions made at the previous steps if necessary.

The planning function of the manager is performed at Steps 1, 2 and 3, and the organizing function is performed primarily at Step 3. The controlling function is performed after implementation at Step 4, while the directing function is performed throughout the process, since people are to be involved at every step in the solution of an educational problem.

The four groups of administrators finished their 13 classes in educational management in January, 1972. During the second semester each of the 31 participants was assigned the task of preparing a written plan to solve a problem of his own selection. Each participant was to utilize what he had learned the first semester in developing this plan. The participants met in their assigned groups seven times throughout the second semester to describe the progress they were making and to get help and suggestions from their peers. The Project director also made himself available for individual planning conferences at the participants' request.

The Project did not succeed its first year to the degree specified by its performance objectives. All 31 participants were expected to submit written plans, but by September, 1972, only 17 plans had been submitted. The evaluation reports for 1971-1972 stated that not only were fewer plans received then expected, but the quality of the plans was lower than expected also. According to the final report for that year,

> ...the 19 participants who submitted Outlines [descriptions of how they were going to go about planning their projects] did not possess a great degree of skill in structuring the planning process they were to follow. The group as a whole received satisfactory ratings on 42 percent of the 16 items on the checklist which was developed for evaluation of the outlines.
>
> The 11 plans received varied considerably in quality and completeness. A 43-item checklist was used for evaluating the written plans. The group as a whole received satisfactory ratings on 52 percent of the checklist items. Percentage ratings for individual plans varied from approximately 18 percent satisfactory ratings to 86 percent satisfactory ratings. (Summary for Part IV of the 1971-1972 Evaluation Report, p. iv.)

Since the administrators' ability to develop satisfactory plans was dependent upon what they had learned about the planning process during the classes they attended the first semester, these results were not surprising. The group of administrators was expected to demonstrate a 40 percent increase in knowledge of educational management concepts and techniques as the result of attending the 13 inservice sessions. The actual result was that the group showed an increase in knowledge of only 26 percent as measured by a series of written pretests and postests.

The 31 administrators who joined the Project in its first year all acquired some knowledge and skill they had not possessed previously and consequently became more familiar with the role of the educational manager as an alternate way of viewing their responsibilities as principals, assistant principals, deans, directors, supervisors or coordinators. No attempt was made in the first year, however, to measure systematically whether the participating administrators had evaluated this new role definition favorably.

With these results in mind, the Project staff (Pete and Sherrie) spent the summer of 1972 revising the Project design to assure that administrators who enrolled the second year would have better opportunities to learn about the role of the educational manager and to put what they learned into practice. Thanks to their detailed evaluation efforts the first year, they had a good deal of the information they needed to decide what revisions to make.

B. Activities and Results of the Project's Second Year

During the summer of 1972, the Project's instructional manual was revised. The content of the formal inservice sessions was reduced since it had been concluded that the first year's content had included too much detail for the participants to digest in the course of 13 weeks. The plan for the second semester's individual planning projects was changed by the addition of a step-by-step

planning manual called How to Plan Your Project. This manual provided each administrator with detailed instructions for developing his project plan using the terminology and techniques introduced during the formal training sessions.

A new dimension was added to the Project in its second year, which was a series of second semester meetings for the purpose of developing a team plan for solving a problem thought important by the members of the team. The Project director led all of these meetings in an attempt to guide the groups toward a complete plan by the end of the year.

Forty-three (43) administrators enrolled in the Project during its second year. During the first year, the four groups were comprised of elementary, junior high, high school and central staff administrators respectively. In its second year, the Project consisted of five groups, two comprised of elementary school administrators and one team each of junior high, high school and central staff administrators. At least two central staff administrators were included on each of the school administrator teams to increase the likelihood of profitable dialogue between school-based administrators and Education Center administrators.

By the end of the first semester of 1972-1973, Pete and Sherrie had guided these 43 administrators through a total of 65 three-hour training sessions (13 sessions per group). As the second semester opened, the administrators were given their planning manuals and urged to begin work on putting together their individual project plans. The five teams began meeting anew, this time to work on a team project of their own selection. The five teams chose these areas of concern to work on:

1) Elementary school libraries and optimizing their use
2) Professional development programs for administrators
3) Ways to improve unsatisfactory teacher performance
4) The pros and cons of a regular transfer program for teachers and administrators
5) The kinds of assistance school principals most need from central staff personnel.

Though the results of the second year's Project activities were somewhat better than the results experienced in the first year, not all of the Project's objectives were successfully met. The first semester formal training sessions proved more successful, and the objective that the participants would increase their knowledge of educational management concepts by 40 percent was met and exceeded. The pre- and posttest data from the participants indicated that the group as a whole increased their knowledge of the content of the sessions by 52.3 percent. This result was taken as evidence that the summer revision of the instructional manual had been worthwhile and that the Project staff had perhaps benefited by their teaching experience from the first year.

When it came to the participants' second semester efforts to apply what they had learned, however, the results were less heartening. By the end of the year, only three of the 43 administrators had submitted their individual project plans. Only about one-fourth of the administrators submitted material demonstrating an intent to prepare a plan. Pete and Sherrie concluded that the planning manual had not served its purpose of helping administrators prepare their plans more or less independently. (Two of the completed plans were done by administrators who were simultaneously enrolled at the University for credit and were thought to have had this additional incentive for completing their work.)

Seven team planning sessions proved inadequate for the completion of the five teams' plans. Each session was expected to result in the completion of one of the major steps of the planning process (listed on page 2,) but by the time the semester's meetings were over, the teams' work had not progressed further than the third step. One of the five teams urged the Project staff to continue the planning meetings the following fall. This team's work eventually culminated in the report, "Fifty Principals' Views Regarding the Assistance They Desire from Central Staff Curriculum Personnel," which received wide attention from district administrators. The other projects were apparently abandoned in their planning stages when the meetings came to an end, although the Project benefited directly from the deliberations of one of the teams. As the result of that teams' efforts to identify the most desirable characteristics of staff development programs for administrators, the Project's third year plan was revised to afford administrators more freedom in choosing the level of Project involvement they thought would best serve their own needs.

C. Activities and Results of the Project's Third Year

The design of the 1973-1974 Project represented a major expansion of the efforts that had been made in the previous two years. Not only was a provision made for the administrator who wished to enroll in the Project's inservice classes for the first time, but strategies were also developed for the previous participant who wanted further exposure to educational management practices and for the administrator who was curious about educational management as an idea but did not wish to commit himself to a full series of daytime inservices classes.

For the third time, written invitations were mailed to all of the district's administrators in the spring urging them to enroll in the Project. Fewer administrators applied for the first time than in previous years; while the first year's participants had to be systematically selected from a group of nearly 100 interested administrators, only 11 enrolled for the Management Study Group, the series of 20 meetings planned for first-time participants.

Eleven (11) administrators enrolled in the Management Study and Application Group, the meetings planned for administrators who had participated in either the first or second year's activities. A third group of administrators was formed from the administrators in that junior high school feeder area which had the highest proportion of previous participants who were willing to pursue a year-long effort to develop a cooperative plan for solving some feeder area problem using educational management techniques. The fourth and final steategy of the Project's third year was a series of monthly informational meetings for all district administrators. All together, 96 administrators took part in the Project's activities during 1973-1974, 57 of whom were first-time participants. Of these 57, 17 were enrolled in one of the three year-long inservice classes.

The reasoning behind the diversification of the Project's strategy was based in research that has been done about the nature of the process of adopting innovations among professional groups. Briefly, a potential adopter in such a group is thought to pass through five successive stages:

1) Awareness of the existence of a new practice or idea,
2) Interest in learning more about the nature of the new idea or set of practices,
3) Favorable evaluation of the applicability of the new practices,
4) Trial of the new practices on a limited basis, and, finally,
5) Full adoption into day-to-day practice.

The monthly meetings were designed to make the district's administrators aware of and interested in the practice of educational management as defined by the Project. The Management Study Group, like the inservice classes for the two previous years, was designed to help the administrators acquire the knowledge necessary to make an informed judgment of the potential applicability of the practices to which they would be introduced. The other two groups, the Management Study and Application Group and the feeder area group, were strategies designed to bring previous participants through the trial stage of the adoption process. The expectations of these two groups resembled those of the groups enrolled the first two years in that they were expected to put what they learned into practice in their own settings. The feeder area group, like the second-year teams, was expected to produce a team plan, while the members of the Study and Application Group were expected to apply what they had learned on an individual basis.

Instead of one instructional manual, the Project staff had to develop four series of session outlines and participant handouts. In order to handle this additional development work, Pete and Sherrie agreed to assume individual responsibility for the different strategies they had planned. Sherrie took on the tasks of developing materials for the Management Study Group and the monthly meetings while Pete agreed to design and conduct the

Management Study and Application Group and the feeder area group and conduct the monthly meetings.

Six monthly meetings were held during the school year. The topics of these meetings were:

1) Time Management
2) Systems concepts
3) Goal analysis and performance objectives
4) The decision-making process
5) The planning function
6) The directing and organizing functions.

Every district administrator was invited to attend each of these meetings whose overall purpose was to generate interest in educational management among administrators who had not previously participated in the Project. While the meetings did result in the introduction of a few more administrators to the practices of educational management, the level of interest generated was less than expected. The 1973-1974 evaluation report noted that attendance at the meetings fell off sharply after the second meeting; thereafter only about 4 percent of the administrators invited actually attended the meetings.

The Management Study Group was conducted as a series of 27 two-and-a-half-hour sessions from September through May. During that time, the 11 members of this group studied these topics:

1) The four functions of management
2) The decision-making process
3) Problem identification and analysis
4) Need assessment procedures and techniques
5) Goal analysis and performance objectives
6) Kinds of communication and skills for improving communication in groups
7) How to make meetings and committees more effective
8) Personal leadership styles and the 3-D Theory of Managerial Effectiveness.

While only 20 meetings were planned, the participants chose to extend the number of meetings in order to study and discuss as many topics as possible. These participants were perhaps the most successful of any of the previous groups of participants in these formal training sessions in that the group as a whole met over 70 percent of the objectives they attempted.

These participants were not expected to immediately apply what they had learned by planning individual projects. Because this dimension of the previous Project strategy had been eliminated, it was possible to introduce the content of the sessions at a more leisurely pace, allowing more time for practice activities and discussion of the concepts and processes of educational management. Session activities were also more carefully designed than in the previous two years; attempts were made to develop practice exercises whose subject matter was not only relevant to the circumstances of the participants, but entertaining as well. Much

of the content of the sessions was more thoroughly researched also so that the presentations of new concepts and ideas would be as easy to understand as possible.

The Management Study and Application Group was comprised of 11 administrators most of whom had participated in the project previously. These administrators were given the opportunity to discuss further some of the management concepts to which they had been introduced. Most of the group's efforts centered on the topics of the four management functions and how their own activities fit into this structure and on the nature and purposes of educational and organizational goals. Though objective evaluation data were too inconsistently collected to establish the overall success of this group, the participants reported in a survey that they appreciated the opportunity to discuss some of the practical applications of the concepts and processes of educational management.

The feeder area group met weekly or biweekly throughout the year to work out a plan for solving a feeder area problem through the use of an administrative team approach. The administrators had difficulty first in selecting a problem to work on and then in systematically planning its solution. By the end of the year, the group had become distracted from the planning process itself in favor of seeking a qualified person to put all extant series of reading objectives into a K-8 sequence. The "administrative team" approach was not seriously discussed by the group, and their plan was never completed. The outcomes of the feeder area group's efforts were quite similar to those which resulted in 1972-1973 when the five teams of participants were asked to prepare team projects.

If any general conclusion can be drawn about the results of the Educational Management Project's activities, it is that while more than half of the district's administrators showed an interest in educational management as a new role definition, most encountered difficulty in putting what they had learned into practice. The Project has no evidence that the administrators who enrolled in the Project's classes judged this new role definition unfavorably. In fact, the attitude measures made at the end of the Project's second and third years indicated that the administrators held values consistent with the practice of educational management and felt that the material to which they had been introduced was of potential value for dealing more successfully with current educational problems. With each succeeding year, the Project's formal training sessions were improved with the result that each year, the participants were able to acquire more knowledge and skill than the previous year. The activities designed to help administrators develop plans using what they had learned, however, failed to result in an improved success rate from year to year. Whether the participants worked individually or in teams, their plans generally developed only to the goal-setting stage and failed to materialize as objectives-based plans for action that could be implemented and evaluated. Though there were, of course, notable exceptions, this outcome changed little from year to year.